



# COUNTY OF LOS ANGELES

## CHIEF INFORMATION OFFICE

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October 10, 2003

To: Supervisor Yvonne Brathwaite Burke, Chair  
Supervisor Don Knabe, Chair Pro Tem  
Supervisor Gloria Molina  
Supervisor Zev Yaroslavsky  
Supervisor Michael D. Antonovich

From: Jon W. Fullinwider   
Chief Information Officer

### STATUS ON RECOMMENDATION CONCERNING E-DOCUMENTING PROJECTS

This memo is in response to your Board's motion of August 6, 2002, instructing my office, together with the Director of Personnel and the Registrar-Recorder/County Clerk, to review various ongoing e-documenting/electronic document management system (EDMS) projects that might be used as a model(s) demonstrating opportunities for improved efficiency within the County, and to report back to you with recommendations. The following information provides a current status on our efforts to conduct a countywide assessment and develop recommendations that address opportunities for the strategic application of EDMS within the County.

As reported previously, an online survey was developed and distributed to all County departments requesting detailed information concerning EDMS projects. The survey identified departments with EDMS systems, the type of applications currently in production or in the planning stages, as well as those departments without EDMS systems but that may have business activities or needs that could be effectively addressed through deployment of EDMS technologies.

Additionally, this office met with the Chief Administrative Office (CAO) to discuss a related February 18, 2003 Board motion instructing the CAO to report back with an overall plan for maintaining and preserving County records and archives, including cost estimates. As a result of that directive, and a subsequent March 4, 2003 Board instruction to the CAO that included reviewing and revising the distribution methods of all interdepartmental correspondence, the CAO issued a four-part survey to all County departments/agencies requesting, in part, information on Records Storage and Electronic Transmission. At our meeting with the CAO, this office agreed to assume the

lead in coordinating both the August 6, 2002 and the March 4, 2003 motions as relates to addressing distribution methods for interdepartmental correspondence and County information, since there were many issues that were common to both efforts.

As was anticipated in our previous status report, this office has now completed the process of acquiring the services of a consultant to assist us in formulating a County strategy, architecture and metrics for the deployment of EDMS, including reviewing the requirements under the Board's March 4, 2003 instruction to the CAO regarding interdepartmental correspondence and County information. The company selected to assist with this effort is Doculabs.

By way of a brief introduction, Doculabs is an independent research and consulting firm that conducts hands-on evaluations of EDM and other technologies and combines those experiences with the real-time business knowledge gained from engagements with other governmental agencies and private sector companies and clients. It was critically important in our solicitation that the selected vendor be completely independent and objective, and have no vested interest in, or realize any revenue from, selling EDM software or integration services. Doculabs clearly meets this requirement.

Doculabs has prior experience working with County departments. They have provided independent assessments and analyses for the Information Systems Advisory Body (ISAB), and are currently working on other projects with both the Probation Department and the District Attorney. Doculabs is currently an approved vendor under the County's Information Technology Support Services Master Agreement (ITSSMA).

The project with Doculabs will be conducted in four (4) phases, and is expected to be completed within the next 90 to 120 days:

- **Phase 1: Current State Assessment**

An in-depth data gathering exercise in which the Doculabs analyst team will gain a detailed understanding of the County's specific needs and current technology solutions. This includes understanding the County's business objectives, assessing current processes, and examining the existing infrastructure. This information will serve as the foundation for subsequent phases of the project, ensuring that Doculabs obtains a well-founded understanding of the County's needs in order to more accurately recommend a conceptual approach for meeting its future state and to recommend the most appropriate strategies.

- **Phase 2: Future State Definition and Conceptual Design**

Based on Doculabs' assessment of the County's current state, the consultant will develop high-level recommendations and a conceptual design for the County's future-state environment at the enterprise level. This high-level conceptual design is intended to help County departments better understand the key components and interdependencies of the EDMS environment.

- **Phase 3: High-Level Deployment Strategy and Tactical Planning**

In this phase, Doculabs will outline the sequencing and the interdependencies of various tactical projects and activities that will be required to move forward with the County's enterprise EDMS strategy.

More specifically, Doculabs will create a high-level deployment strategy or roadmap that identifies the major initiatives in support of the County's business requirements and ideal future state, identifying key interdependencies, priorities and opportunities. This plan will identify and prioritize those activities that should be conducted within the next three to eighteen months.

- **Phase 4: Validation and Communication**

In this phase, Doculabs will aggregate its analyses into a final report. Once the report is finalized, Doculabs will conduct formal on-site presentations of the final report and its recommendations. Doculabs will present this information to the following groups of individuals:

1. **Department Heads/Directors.**
2. **Chief Deputies.**
3. **Half-day EDMS Workshop with Department CIOs/IT Directors.** This will entail a half-day meeting to present the strategy, discuss the technical details, and to answer questions.

My office will continue to provide your Board with status reports at 60-day intervals until a final report is issued. If you have questions or require additional information, please contact me at (213) 974-2008, or in my absence, Jonathan Williams at (213) 974-2080.

JWF:GM  
EB:ygd

Attachment

c: Michael J. Henry, Director, DHR  
Conny McCormack, Registrar-Recorder/County Clerk  
Susan Toy Stern, Chief Deputy, DHR  
Raoul Freeman, Chair, Information Systems Commission